

## TOPIC 10: GENERATING GROUP TIMESHEETS

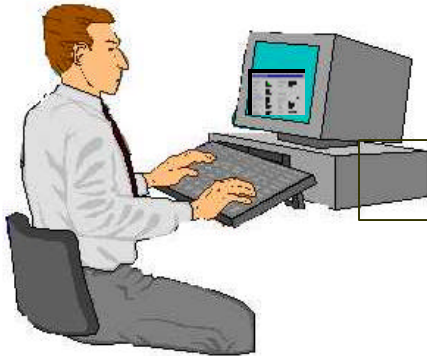
The purpose of this topic is to present the steps involved in entering daily time and leave for a crew of employees at the same pay location using timesheet generation. In this topic you will enter time and leave using the Current Period Crew Timesheet Document Generation (CRGN) and the Current Period Crew Timesheet (CREW). You will also learn how to make corrections to time and leave that was previously entered using the Prior Period Timesheet (PPER).

**At this end of this topic, you will be able to:**

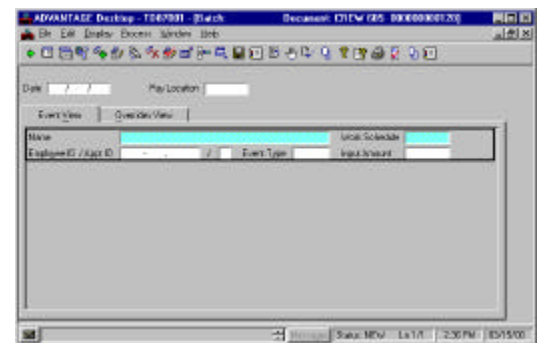
- Generate the Current Period Crew Timesheet (CREW) for employees at the same pay location using the Current Period Crew Timesheet Document Generation (CRGN)
- Enter specific time and leave information for employees at the same pay location using the Current Period Crew Timesheet (CREW)
- Understand how to correct entered hours using a Prior Period Timesheet (PPER)

# TIMESHEET DOCUMENT GENERATION OVERVIEW

## CRGN Entry



**CREW**



**SUSF**

Batch Type	Batch Agency	Batch Number	Doc Type	Doc Agency	Doc Number	Status	Approvals	Last Date	Last User
OREW	605	ACH-1	HELO	80000	03 07 00	TD90			
OREW	605	ACH-1	HELO	80000	03 07 00	TD90			
OREW	605	ACH-2	????						
OREW	605	WEN24034	SCHED	80000	03 08 00	TD96			
OREW	605	WEN788	DELET	80000	02 23 00	TD96			
OREW	605	0000000001	ACOPT	80000	03 02 00	TD96			
OREW	605	0000000002	ACOPT	80000	03 02 00	TD96			
OREW	605	0000000003	ACOPT	80000	03 02 00	TD96			
OREW	605	0000000004	DELET	80000	03 02 00	TD96			
OREW	605	0000000005	HELO	80000	03 02 00	TD96			
EAGU	100	SEN 1-001	PEN D1	AAAAA	03 01 00	DATA2			
EAGU	100	CHV500005444	PL-CT	80000	02 04 00	OFF.			
EAGU	100	CHV500005445	PL-CT	80000	02 04 00	OFF.			



## GENERATING GROUP TIMESHEET DOCUMENTS

The SAM II HR/Payroll System provides functionality for entering and viewing time and attendance data at a group level (Pay Location) as well as an individual employee level. A CPER or PPER allows entry of information only at the employee level. The ability to enter a timesheet for a group of individuals working the same jobs is a great time-saver.

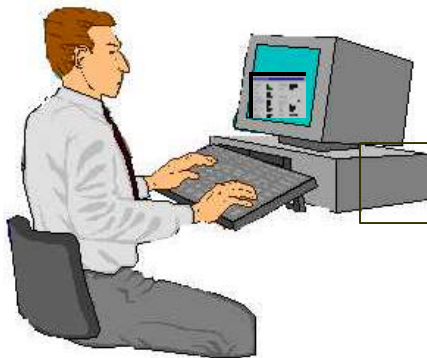
Crew supervisors or clerks will make crew time and cost accounting entries directly into the SAM II HR/Payroll system for employees who work within their specific pay locations. To accomplish this, the crew supervisors or clerks must have the same or a higher security level than their crew members. NOTE: A crew can be a group of employees who work in the same accounting attributes and report time through one central supervisor.

Crew timesheets will be entered, approved, and run on a daily basis to ensure the accuracy of crew time information.

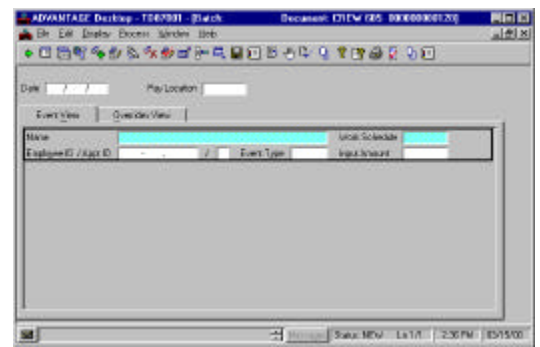
The screens that accomplish group time entry are the Current Period Crew Timesheet Document Generation (CRGN) and the Current Period Crew Timesheet (CREW). The functionality that exists between the Current Period Crew Timesheet Document Generation (CRGN) and the Current Period Crew Timesheet (CREW) is that the CRGN generates the CREW from user specified data.

# TIMESHEET DOCUMENT GENERATION OVERVIEW

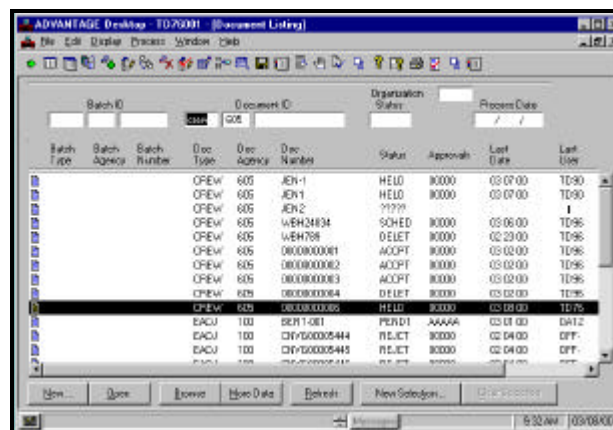
## CRGN Entry



## CREW



## SUSF





## TIMESHEET DOCUMENT GENERATION OVERVIEW

When a timekeeper or supervisor wishes to enter time for a crew at a specific pay location, he/she will complete the Current Period Crew Timesheet Document Generation (CRGN) and submit it for update. This will select and include all individuals in that agency with the payroll location on the submitted CRGN.

The Current Period Crew Timesheet (CREW) document will be created by the on-line document generation process from the data contained in the Current Period Crew Timesheet Document Generation (CRGN). Information from each selected employee's work schedule will be used in the generation of the lines on the Current Period Crew Timesheet (CREW).

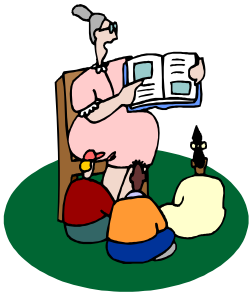
Once valid information is entered on the CRGN and the entry is updated successfully, the Current Period Crew Timesheet (CREW) document is generated and posted on the Document Listing (SUSF) and the appropriate user(s)'s worklist in a "Held" status. It can be opened from SUSF or a user's worklist for verification, correction, or further processing. This document generation process will make time and attendance data entry tasks easier by automatically creating document lines. By utilizing this process, the user will not need to enter the same information multiple times in different document lines. Users will be able to add, delete, or modify any generated document lines before processing the document.

Once entries are correct, the Current Period Crew Timesheet (CREW) is submitted to the pay process. After submission, approval, and update occur successfully, all processed time and attendance data can be inquired upon.

**Note:** Since positive-paid employees do not have a standard work schedule, using CRGN for a positive-paid employee will generate a CREW document with a line for the employee and hours worked regardless of whether the employee worked that day or not. Users will need to open the generated CREW document and delete lines as necessary.



## NOTES



## SCENARIO

You are a timekeeper for your agency. It is at the end of the day and you are ready to enter time for the Alpha Crew. The Alpha Crew consists of 6 employees.

One of your exception paid employees took 4 hours of annual leave (but did not submit an LREQ). The individual was scheduled to work the regular 8-hour day. The rest of the crew worked 1 hour overtime (for which they receive time and a half) to complete all the work. Submit the time and pay for this crew for today.

**Hint:** You must initially complete the Current Period Crew Timesheet Document Generation (CRGN) window. Then you must modify the Current Period Crew Timesheet (CREW).



## CURRENT PERIOD CREW TIMESHEET DOCUMENT GENERATION (CRGN)

**ADVANTAGE Desktop - OA420**

File Edit Display Modify Window Help

Current Period Crew Timesheet Document Generation

Document Agency	580	Document Number	302317#
Event Date	09 / 05 / 00	Document Org	3023
Event Type	ADDHR	Pay Location	TA49T0
Input Amount		<input type="checkbox"/> Reduce Base Pay Type	

[Accounting Overrides](#)

Labor Distribution Profile		Distribution Option	Employee Assignment
Fund		Agency	
Organization / Sub	/	Appr Unit	
Activity		Function	
Object / Sub	/	Job Number	
Report Category			

Messages 9:12 AM 06/13/00



## NOTES



## CURRENT PERIOD CREW TIMESHEET DOCUMENT GENERATION (CRGN)

The Current Period Crew Timesheet Document Generation (CRGN) table uses the user-specified data to generate the Current Period Crew Timesheet (CREW).

**Step 1** To open the CRGN from the SAM II Desktop Navigator window, click on the Go To icon. Type **CRGN** in the **CODE** column header and click on the **<OPEN>** button.

**Step 2** Populate the following fields on the CRGN.

**DOCUMENT AGENCY** – Required. Enter the agency code. **SEE STUDENT CARD.**

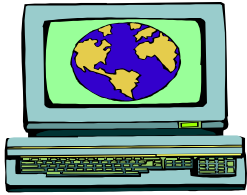
**DOCUMENT NUMBER** – Required. Enter a prefix and a '#' sign in the Document Number field and a unique document number starting with the entered prefix will be used on the generated CREW document. **SEE STUDENT CARD.**

**DOCUMENT ORG** – Required. Enter the organization code. **SEE STUDENT CARD.**

**EVENT DATE** – Required. Enter the date (mm/dd/yy) on which the specified event occurs. **SEE STUDENT CARD.**

**PAY LOCATION** – Required. Enter the pay location assigned to the crew. Refer to the Location (LOC) window for valid codes. **SEE STUDENT CARD.**

**EVENT TYPE** - Required. Enter the appropriate default pay or leave event code. The event entered here will default to every line generated for crew members. Once the Crew Timesheet has been generated, this event can be changed in any of the document detail lines. Two of the most common codes are "REGLR" for all regularly scheduled hours and "ADDHR" for any hours over the normal work schedule. Refer to the Event Type (EVNT) window for other valid codes. Type **ADDHR.**



## CURRENT PERIOD CREW TIMESHEET DOCUMENT GENERATION (CRGN)

**ADVANTAGE Desktop - OA420**

File Edit Display Modify Window Help

Current Period Crew Timesheet Document Generation

Document Agency	580	Document Number	302317#
Event Date	09 / 05 / 00	Document Org	3023
Event Type	ADDHR	Pay Location	TA49T0
Input Amount	1	<input type="checkbox"/> Reduce Base Pay Type	

[Accounting Overrides](#)

Labor Distribution Profile		Distribution Option	Employee Assignment
Fund		Agency	
Organization / Sub	/	Appr Unit	
Activity		Function	
Object / Sub	/	Job Number	
Report Category			

Messages 9:13 AM 06/13/00



## NOTES



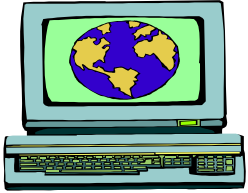
## CURRENT PERIOD CREW TIMESHEET DOCUMENT GENERATION (CRGN)

**Step 2** Continue to populate the following fields on the CRGN.

**INPUT AMOUNT** – Required. Enter the appropriate default daily input amount for the Event Type code entered above. The amount entered here is an individual amount (not a total for the crew) that will appear on each line generated for crew members. Once the Crew Timesheet has been generated, this amount can be changed in any of the document detail lines. If an amount is negative, enter a minus (-) sign in the first character of the field. Type 1.

Note: If the input amount is in time, the entry must be in hours and minutes. All input amounts must be in increments of 15 minutes (for example, 1.15 for 1¼ hour; 1.30 for 1½ hour; and 1.45 for 1¾ hour). A value of 1.20 or 1.43 is not valid.

**REDUCE BASE PAY TYPE** – For exception-paid employees the Reduce Base Pay Type checkbox must be selected when the Event Type is “REGLR” (Regular Pay Event) so that the pay from hours charged to this event is counted against the system-generated base pay amount. Otherwise this pay will be considered in addition to the exception base pay. For positive-paid employees, the Reduce Base Pay Type checkbox cannot be selected. If a crew has both exception-paid employees and positive-paid employees, the checkbox can either be selected or not, and the information can be overridden as needed at the employee level on the CREW document.



## CURRENT PERIOD CREW TIMESHEET DOCUMENT GENERATION (CRGN)

**ADVANTAGE Desktop - OA420**

File Edit Display Modify Window Help

Current Period Crew Timesheet Document Generation

Document Agency	580	Document Number	302317#
Event Date	09 / 05 / 00	Document Org	3023
Event Type	ADDHR	Pay Location	TAA9T0
Input Amount	1	<input type="checkbox"/> Reduce Base Pay Type	

Accounting Overrides

Labor Distribution Profile		Distribution Option	Employee Assignment
Fund		Agency	
Organization / Sub	/	Appr Unit	
Activity		Function	
Object / Sub	/	Job Number	
Report Category			

Messages 9:13 AM 06/13/00



NOTES



## CURRENT PERIOD CREW TIMESHEET DOCUMENT GENERATION (CRGN)

**Step 2** Continue to populate the following fields on the CRGN.

### ACCOUNTING OVERRIDES

If fields on the Accounting Overrides Panel are left blank, the accounting information will default from wherever it is defined in the system. Generally, it will come from the employee's position in the Position Status Maintenance (PSMT) window. However, the default could also be generated from the Agency Specific and Accounting Data (AGYS) window. If the default accounting information from one of these sources should not be used, enter the accounting information that should appear as the default on the generated document for the pay period.

If accounting overrides are necessary, enter the following fields:

**DISTRIBUTION OPTION** – Select “Employee Assignment” to use the default labor distribution attributes. Any information entered in the accounting fields when this Distribution Option is selected will result in an error when the user tries to update the CRGN. Select “Entered Profile” to use an override labor distribution profile. Select “Entered Acctg Values” to override the default accounting attributes. If “Entered Acctg Values” is used, slashes (/) will default into all of the accounting fields except Activity, Function, Job Number, and Reporting Category on both the CRGN and the generated CREW document. Fields with slashes will use the employee's default accounting values. This allows users to change only certain accounting fields, without entering information in all accounting fields. Select “Position Assignment” to use the accounting attributes assigned to the employee's position.



## CURRENT PERIOD CREW TIMESHEET DOCUMENT GENERATION (CRGN)

**ADVANTAGE Desktop - DA420**

File Edit Display Modify Window Help

Current Period Crew Timesheet Document Generation

Document Agency	580	Document Number	302317#
Event Date	09 / 05 / 00	Document Org	3023
Event Type	ADDHR	Pay Location	TAA9T0
Input Amount	1	<input type="checkbox"/> Reduce Base Pay Type	

[Accounting Overrides](#)

Labor Distribution Profile		Distribution Option	Employee Assignment
Fund		Agency	
Organization / Sub	/	Appr Unit	
Activity		Function	
Object / Sub	/	Job Number	
Report Category			

Messages 9:13 AM 06/13/00



## NOTES



## CURRENT PERIOD CREW TIMESHEET DOCUMENT GENERATION (CRGN)

**Step 2** Continue to populate the following fields on the CRGN.

**LABOR DISTRIBUTION PROFILE** – Conditional. If “Entered Profile” is selected as the Distribution Option, enter the appropriate profile. If a Labor Distribution Profile code is entered and any of the following fields are populated: Activity, Function, Job Number or Reporting Category, then the corresponding code for the Labor Distribution Profile code on the Labor Distribution Profile Table (LDPR) will be overwritten for this document entry. If this field on the LDPR entry is not blank, a warning message will be issued, but the field will still be overwritten.

For example, if an Activity code is entered on the document and the corresponding field on the LDPR entry is not blank, the Activity field for the specific Labor Distribution Profile code on LDPR for this document will be overwritten and a warning message will be issued when the user updates the CREW entry. If the Activity field for the specific Labor Distribution Profile code on LDPR is blank, no warning message is issued.

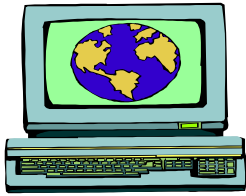
If Entered Accounting values has been chosen in the Distribution Option field, then an appropriate combination of the following fields must be populated.

**FUND** - Conditional. This is required if Entered Accounting Values is selected in the Distribution Option field. Enter the fund to which the specified percentage is to be charged, or leave the default slash (/) in the field. Valid values are located on the Fund (FUND) window.

**AGENCY** - Conditional. This is required if Entered Accounting Values is selected in the Distribution Option field. Enter the agency to which the specified percentage is to be charged, or leave the default slash (/) in the field. Agency must be valid with the entered fund. See Fund Agency Index (FAGY) for valid fund and agency combinations.

**ORGANIZATION** - Conditional. This is required if Entered Accounting Values is selected in the Distribution Option field. Enter the organization to which the specified percentage is to be charged, or leave the default slash (/) in the field. Valid values are located on the Organization Index (ORGN) window.

**SUB-ORG** - Conditional. This may be required if Entered Accounting Values is selected in the Distribution Option field. Enter a sub-organization, or leave the default slash (/) in the field. Valid values are located on the Sub-Organization (SORG) window.



## CURRENT PERIOD CREW TIMESHEET DOCUMENT GENERATION (CRGN)

**ADVANTAGE Desktop - OA420**

File Edit Display Modify Window Help

Current Period Crew Timesheet Document Generation

Document Agency	580	Document Number	302317#
Event Date	09 / 05 / 00	Document Org	3023
Event Type	ADDHR	Pay Location	TA49T0
Input Amount	1	<input type="checkbox"/> Reduce Base Pay Type	

[Accounting Overrides](#)

Labor Distribution Profile		Distribution Option	Employee Assignment
Fund		Agency	
Organization / Sub	/	Appr Unit	
Activity		Function	
Object / Sub	/	Job Number	
Report Category			

Messages 9:13 AM 06/13/00



## CURRENT PERIOD CREW TIMESHEET DOCUMENT GENERATION (CRGN)

**Step 2** Continue to populate the following fields on the CRGN.

**APPROPRIATION UNIT** - Conditional. This is required if Entered Accounting Values is selected in the Distribution Option field. Enter the appropriation unit code to which the employee reports, or leave the default slash (/) in the field. Valid values are located on the Appropriation Index (APPR) window.

**ACTIVITY** - Conditional. This may be required if Entered Accounting Values is selected in the Distribution Option field. Enter the activity code to which the specified percentage is to be charged. Valid values are located on the Activity Index (ACTV) window.

**FUNCTION** - Conditional. This may be required if Entered Accounting Values is selected in the Distribution Option field. Enter the function code representing the budget for the group-related activity. Valid values are located on the Function (FUNC) window.

**OBJECT** - Conditional. This is required if Entered Accounting Values is selected in the Distribution Option field. Enter the object to which the specified percentage is to be charged, or leave the default slash (/) in the field. Valid values are located on the Object (OBJT) window.

**SUB-OBJECT** - Conditional. This may be required if Entered Accounting Values is selected in the Distribution Option field. Enter the sub-object if a further breakdown of object is employed, or leave the default slash (/) in the field. Valid values are located on the Sub-Object (SOBJ) window.

**JOB NUMBER-** Conditional. This may be required if Entered Accounting Values is selected in the Distribution Option field. Enter the job code used to track specific costs associated with particular projects or jobs. Valid values are located on the Job Index (JOBT) window.

**REPORT CATEGORY** - Conditional. This may be required if Entered Accounting Values is selected in the Distribution Option field. Enter the report category. Valid values are located on the Reporting Category (RPTG) window.



## MODIFY: UPDATE THE CRGN

**ADVANTAGE Desktop - QA430**

File Edit Display **Modify** Window Help

Update F8  
Delete F9

**Current Period Crew Timesheet Document Generation**

Document Agency	580	Document Number	30231700275
Event Date	09 / 05 / 00	Document Org	3023
Event Type	ADDHR	Pay Location	TA49T0
Input Amount		<input type="checkbox"/> Reduce Base Pay Type	

Accounting Overrides

Labor Distribution Profile		Distribution Option	Employee Assignment
Fund		Agency	
Organization / Sub	/	Appr Unit	
Activity		Function	
Object / Sub	/	Job Number	
Report Category			

ALL LINES ADDED Messages 4:02 PM 06/21/00



## NOTES



## CURRENT PERIOD CREW TIMESHEET DOCUMENT GENERATION (CRGN)

You have completed entering the field information for the CRGN and it is time to update and approve it. Here, we will be using the Modify: Update step to check the CRGN for errors.

Now, let's complete the updating process for the CRGN.

### Step 1 Select **Modify: Update**.

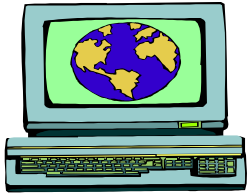
You should receive the message "ALL LINES ADDED." This indicates that the CREW document has been generated in a HELD status.

**Note:** The document number of the generated CREW document is now displayed in the **DOCUMENT NUMBER** field. This is the document you will open and edit.

The Current Period Crew Timesheet Document Generation (CRGN) screen supports automatic document numbering. The document generation screen will work with Workflow. The Modify: Update action will cause the table entries you have added to be edited to ensure the information is valid. If the entries pass the edits, the CRGN table will be updated with the information.

The CREW document will be generated (based on the pay location) and sent to the appropriate user's worklist, as well as being posted to the Document Listing (SUSF) in a Held status. Users will then be able to access the generated Current Period Crew Timesheet (CREW) from their worklist or SUSF and make any necessary changes.

### Step 2 Close the CRGN window.



## ACCESSING A CURRENT PERIOD CREW TIMESHEET (CREW)

### The Document Listing (SUSF)

**ADVANTAGE Desktop - OA430**

File Edit Display Process Window Help

Document Listing

Batch ID: [ ] [ ] [ ] Document ID: [ ] [ ] [ ] Organization Status: [ ] Process Date: [ ] / [ ] / [ ]

Batch Type	Batch Agency	Batch Number	Doc Type	Doc Agency	Doc Number	Status	Approvals	Last Date
[ ]			CREW	580	30231700273	HELD	00000	06 21 00
[ ]			CREW	580	30231700274	HELD	00000	06 21 00
[ ]			CREW	580	30231700275	HELD	00000	06 21 00
[ ]			CREW	580	30231700276	HELD	00000	06 21 00
[ ]			LABR	010	201811000302	PEND3	YYA00	06 21 00
[ ]			LABR	650	BE0003000202	PEND3	YYA00	06 21 00
[ ]			LEAV	300	LEAVETL4w162	ACCPT	YYY00	06 19 00
[ ]			LEAV	300	LEAVETL4w163	ACCPT	YYY00	06 19 00
[ ]			LEAV	300	LEAVETL4w164	ACCPT	YYY00	06 19 00
[ ]			LEAV	300	LEAVETL4w165	ACCPT	YYY00	06 19 00

New ... Open Browse More Data Refresh New Selection ... Clear Selection

Messages 4:12 PM 06/21/00



## NOTES



## ACCESSING A CURRENT PERIOD CREW TIMESHEET (CREW)

Once the CRGN entry has been updated successfully, the Current Period Crew Timesheet (CREW) will be generated and posted to both the Document Listing (SUSF) and the appropriate user(s)'s worklist in a "Held" status. This document contains lines for all of the employees who belong to the specified pay location. As a result, it allows a user to enter time / leave for all the employees within a respective pay location.

Any member of the crew who has requested leave through the Leave Request Document (LREQ) for the same event date will have two lines generated on the CREW document. One line will indicate the Leave Event Code and the requested hours. The second line will indicate the Event Type code that was entered on the Current Period Crew Timesheet Document Generation (CRGN) screen and the remaining hours in their scheduled work day.

Since one of the employees took 4 hours of annual leave without an LREQ document, you will still have to edit the generated CREW document accordingly.

The CREW document can be accessed in one of two ways.

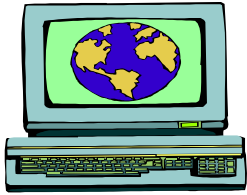
**Step 1** In the first option, select SUSF - the Document Listing window using the Go To functionality to locate the CREW.

The SUSF window is used to retrieve and process documents whose updates or deletions have been suspended (put on hold). This window is a temporary holding place for data uploaded to the database and data generated as a result of online updates.

**Step 2** Enter the document code **CREW** in the first box of the Document ID field and agency code in the second box of the Document ID field.

**Step 3** Select the <**BROWSE**> button at the bottom of the screen. The CREW document(s) for that agency will be displayed. Look at Doc Number field to identify the CREW document generated from the CRGN update. It may be necessary to select the "More Data" button to locate the correct CREW document.

**Step 4** Once the generated CREW document is located, double click on it. The CREW window will be opened.



## ACCESSING A CURRENT PERIOD CREW TIMESHEET (CREW)

### Worklist

**ADVANTAGE Desktop - OA430**

File Actions Window Help

Navigator

- ADVANTAGE Desktop
  - Inbox
  - Worklist
    - ADVANTAGE HR
      - Applicant Tra
      - Employee Tra
      - Documents
      - Job Notice T
      - Position Tran
  - Go To
  - Business Areas
  - Bookmarks

Date	Last User	Work ID	Approvals
06/21/2000	OA430 <T...	CREW580 30231700276	00000
06/21/2000	OA430 <T...	CREW580 30231700275	00000
06/21/2000	OA430 <T...	CREW580 30231700274	00000
06/21/2000	OA430 <T...	CREW580 30231700273	00000
06/21/2000	OA430 <T...	CITS580 30231700323	00000

5 work unit(s) in 'Documents'

Double click on work unit to open

Organization

Messages | 4:14 PM | 06/21/00

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## ACCESSING A CURRENT PERIOD CREW TIMESHEET (CREW)

The second method for locating the CREW document involves using the Worklist function. Once a CREW document has been created using CRGN, that document will automatically route to the appropriate user's worklist.

**Step 1** Click on the Worklist icon in the Navigator window.

**Step 2** Click on the plus signs next to the Worklist icons to drill down into the Documents folder of the ADVANTAGE HR Worklist.

**Step 3** If necessary, refresh your worklist by right-clicking on the worklist icon and selecting "Refresh Worklist" from the menu that appears.

**Step 4** Double-click on the correct CREW document to open it.

**Step 5** (If necessary) enter your organization code and click <OK> in the window that appears.

[Current Period Crew Timesheet](#)